Digital Transformation Canvas
The 7 Action Fields of Transformation

Prof. Dr. Marc K. Peter
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1. **Customer Centricity**
   - What are our target segments with the highest potential?
   - What digital channels do we have?

2. **New Technologies**
   - What are the new technologies available today and in the future, and what potential do they have for our customers and to our organisation?
   - Which software solutions/apps could actively support our value propositions and processes?

3. **Cloud and Data**
   - Have we linked the existing platforms and data in the best possible ways?
   - Are our IT systems, including web-based solutions, easily accessible and scalable for our customers and partners?

4. **Digital Business Development**
   - How resistant and futureproof is my current business model?
   - What strategies, business models, and products do my competitors and innovative companies offer?

5. **Process Engineering**
   - What are my current processes and which processes do we have to modify due to new requirements and technologies (Tool: Process Map)?
   - Which processes can we digitise and automate, and how?

6. **Digital Leadership & Culture**
   - Where do our employees stand and what is their attitude towards digital transformation?
   - Which new management principles and organisational forms do we want to introduce?

7. **Digital Marketing**
   - What is the current customer satisfaction per segment?
   - Which systems and processes will we have to adapt?

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www.kmu-transformation.ch

The full research report, practical guide and the Digital Transformation Canvas are available in PDF format on www.kmu-transformation.ch

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1. **Customer Centricity**
   Organisations place a strong focus on customer orientation, personalised offers, digital communication and sales channels.

2. **New Technologies**
   This includes platforms and apps as well as the connection of industrial components and consumer products (Industry 4.0 and Internet of Things).

3. **Cloud and Data**
   Digital activities require data-driven models and systems, smart data and a flexible, web-based IT infrastructure.

4. **Digital Business Development**
   Organisations are challenging existing products and services in order to provide new or extended services/business models through innovations, new platforms and cooperations.

5. **Process Engineering**
   Processes should be standardised, streamlined, faster and more efficient and, where possible, be digitised and automated.

6. **Digital Leadership & Culture**
   Digitisation is driving a change process which leads to an adaptation of management principles and new organisational forms.

7. **Digital Marketing**
   With digital marketing, new and sometimes automated approaches in sales, communication, customer service and relationship management arise.

The seven action fields of Digital Transformation are based on the research from Prof. Dr. Marc K. Peter in 2017 among 2,590 Swiss organisations and 4,286 identified digital projects/activities.


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The How-To Guide for a Digital Transformation

The objective of a Digital Transformation is to transform an organisation into a form in which it can achieve and maintain a competitive position in the digital age. Transformation initiatives require an analysis of the market, customers and new technologies as well as internal values, processes and resources. The output is a digital strategy with a clear vision, new business options and an implementation roadmap.

Here, the Digital Transformation Canvas plays an important role as it facilitates strategy analysis and development based on the seven action fields of transformations. The seven action fields of Digital Transformation are based on the research from Prof Dr Marc K Peter among 2,590 Swiss organisations. Each action field includes a brief definition and a set of questions for workshops with strategy, HR, IT, finance, marketing, product and project teams in your organisation.

The Digital Transformation can be planned as a strategic initiative, which will subsequently be implemented in several projects. The following simplified process is recommended:

**Step 1:** Maturity Analysis
Based on the current situation of the organisation, the maturity analysis is utilised to identify and define the most important drivers and indicators for the transformation project. This enables an initial discussion and the determination of priorities.

**Steps 2 and 3:** Strategic Analysis
In a second and third step, the analysis phase deals with the seven action fields and first projects are outlined. From an external perspective (step 2), the customers, the market and new technologies are analysed; from an internal perspective (step 3), processes, the cultural dimensions and leadership approaches, services and data are described. Here, the canvas is used, which provides practical guidance and key questions for workshops.

**Step 4:** Strategy Development
The fourth step describes the digital vision and defines the unique value proposition. This includes the development and implementation of digital business options, definition of products and services in the value chain and the required core processes with their IT requirements.

**Step 5:** Roadmap & Implementation
The resulting roadmap (the implementation plan) includes the definition of subprojects and project plans in the classical sense. It is recommended to define a feasible project scope, to work with external partners and, where meaningful, to identify quick wins.

**Step 6:** Change Management and Leadership
In the sixth step, the key enablers of change management, leadership and cultural development are planned. The development of values and rules of conduct with all employees as well as the coaching and ongoing development of employees are central to a successful change process.

**Step 7:** Marketing and Continuous Optimisation
Finally, the renewed organisation and its products and services are marketed. This includes marketing, sales and customer service teams. In addition, market feedback with valuable information flows back into the entire ecosystem in order to continuously identify new potential and improve the value chain. This concludes the process loop of strategic planning.